

Form **4506-T**

(Rev. April 2006)

Department of the Treasury  
Internal Revenue Service**Request for Transcript of Tax Return**

Do not sign this form unless all applicable parts have been completed.  
Read the instructions on page 2.  
Request may be rejected if the form is incomplete, illegible, or any required line was blank at the time of signature.



OMB No. 1545-1072

**TIP:** Use new Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can also call 1-800-829-1040 to order a transcript. If you need a copy of your return, use Form 4506, Request for Copy of Tax Return. There is a fee to get a copy of your return.

**1a** Name shown on tax return. If a joint return, enter the name shown first.

U.S. Beverage

**1b** First social security number on tax return or employer identification number (see instructions.)

59-3185211

**2a** If a joint return, enter spouse's name shown on tax return**2b** Second social security number if joint tax return**3** Current name, address (including apt., room, or suite no.), city, state, and ZIP code

844 Lagoon Commercial Blvd., Montgomery, AL 36117

**4** Previous address shown on the last return filed if different from line 3**5** If the transcript or tax information is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number. The IRS has no control over what the third party does with the tax information.

Houston Community Bank, 13811 Murphy Road, Stafford, TX 77477, Attn: Viki Moore, Sr. Vice President

**CAUTION:** If a third party requires you to complete Form 4506-T, do not sign Form 4506-T if lines 8 and 9 are blank.**6** Transcript requested. Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request. 1120S

**a** **Return Transcript**, which includes most of the line items of a tax return as filed with the IRS. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120A, Form 1120H, Form 1120L, and Form 1120S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days. ☒

**b** **Account Transcript**, which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 30 calendar days. ☐

**c** **Record of Account**, which is a combination of line item information and later adjustments to the account. Available for current year and 3 prior tax years. Most requests will be processed within 30 calendar days. ☐

**7** **Verification of Nonfiling**, which is proof from the IRS that you did not file a return for the year. Most requests will be processed within 10 business days. ☐

**8** **Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript.** The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2003, filed in 2004, will not be available from the IRS until 2005. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 45 days. ☐

**CAUTION:** If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed with your return, you must use Form 4506 and request a copy of your return, which includes all attachments.

**9** **Year or period requested.** Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than four years or periods, you must attach another Form 4506-T. For requests relating to quarterly tax returns, such as Form 941, you must enter each quarter or tax period separately.

12/31/2004

12/31/2003

12/31/2005

**Signature of taxpayer(s).** I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, either husband or wife must sign. If signed by a corporate officer, partner, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-T on behalf of the taxpayer.

John B. Walker

Signature (see instructions)

Date

Telephone number of taxpayer on line 1a or 2a

281-392-6997

**Sign Here**

Shareholder

Title (If line 1a above is a corporation, partnership, estate, or trust)

**EXHIBIT****13**

Spouse's signature

Date

Department of the Treasury  
Internal Revenue Service  
Austin, TX 73301

**In response to your request:**

☐ Your request was received without payment or insufficient payment. A fee of \$39.00 is required for each tax year requested.

☐ Your request must be signed and dated. If your request is to be sent to a third party, current disclosure laws require that the signature and date are within 60 days of the IRS received date. To ensure the authenticity of the authorization, the taxpayer must provide the date on the Form 4506, Request for Copy of Tax Return or Form 4506-T, Request for Transcript of Tax Return.

☐ We are unable to accept an altered Forms 4506, Request for Copy of Tax Return, or Form 4506-T, Request for Transcript of Tax Return. Please complete and return a **new** Form 4506 or Form 4506-T.

☐ Form 4506-T is specifically designed to provide tax return transcripts pertaining only to Form(s) 1040, 1065, 1120, or 1120S for purposes of the Small Business Administration agreement. Form 4506 is to request an actual photocopy of the tax return and requires a \$39.00 fee for each tax period requested.

☐ Line 1 through 9 must be complete. Please refer to the highlighted area on your request and provide missing information.

☒ When requesting tax account information, we must have the appropriate signature, title, current date, and proper authorization meeting IRS guidelines.

Form	Title	Authorization
Form 1120	U.S. Corporation Income Tax Return	Signature of President or two corporate officers on 4506/4506-T, with current date
Form 1120S	U.S. Income Tax Return for an S Corporation	Signature of shareholder and proof of shares for the tax year requested, with current date
Form 1065	U.S. Return of Partnership Income	Signature of Partner with current date
Form 1065 for a Limited Liability Company (LLC)	U.S. Return of Partnership Income	Signature of LLC Member Manager with current date
Form 940	Employer's Annual Federal Unemployment (FUTA) Tax Return	Signature of corporate officer with current date
Form 941	Employer's Quarterly Federal Tax Return	Signature of corporate officer with current date
Form 1041	U.S. Income Tax Return for Estates & Trusts	Signature of Trustee or Executor with current date
Form 1040	U.S. Individual Income Tax Return	Power of Attorney (Form 2848), Tax Information Authorization (Form 8821), or Letters of Testamentary, Administration, or Guardianship (court papers) with current date.

☐ The required information needed to release taxpayer information to a third party was incomplete. Please complete line 5 on the Form 4506, Request for Copy of Tax Return, or Form 4506-T, Request for Transcript of Tax Return.

☐ We no longer have tax account or record of account information for tax year(s) \_\_\_\_\_. Tax account information is only on file for a limited number of years.

☐ We have no record of the tax information requested for tax year(s) \_\_\_\_\_.

☐ We have enclosed your request for tax year(s) \_\_\_\_\_. We are unable to provide tax account information for tax year(s) \_\_\_\_\_.

☐ The requested tax return transcripts are available **only** for the Form(s) 1040 series, 1120 series, and 1065. Tax return transcripts are available **only** for the current tax year and the three preceding tax years.

☐ A fee is not required for your request. A refund will be issued within 60 days.

☐ A verification of non-filing cannot be issued for the current processing year until after June 15<sup>th</sup>. Please resubmit your request after this date.

☐ We are unable to provide tax information for tax year(s) \_\_\_\_\_ because your spouse did not sign the request you submitted.

☐ Forms or tax information for tax year \_\_\_\_\_ is not available until \_\_\_\_\_.

☐ We have enclosed printout(s) of Form(s) W-2/W-3, 1099, 1098 and/or 5498 for tax year(s) \_\_\_\_\_. State or local information will not be included with the printout(s).

☐ We do not have Form(s) W-2/W-3, as submitted by the employer, for tax years prior to \_\_\_\_\_. The Social Security Administration (SSA) can provide social security earnings information for older tax years. Written request can be mailed, along with a fee (a fee is charged for non-retirement requests) for each tax year. You may contact the SSA at 1-800-772-1213 or submit a written request to:

Social Security Administration  
Division of Earnings Records Operations  
PO Box 33003  
Baltimore, MD 21290-3003

Or, you may request this information from the employer who issued your Form(s) W-2.

To obtain a copy of Form 5500 you must write to:

Public Disclosure Office, Room N-1513  
Pension and Welfare Benefits Administration  
200 Constitution Ave, N.W.  
Washington, DC 20210

☐ The taxpayer's name and Social Security/Employer Identification number does not match our records or was incomplete or missing. Please correct this information.

☐ Individual tax information and business tax information must be requested on separate Forms 4506, Request for Copy of Tax Return, or Form 4506-T, Request for Transcript of Tax Return.

☐ We do not have a record of receiving a \_\_\_\_\_ tax return. However, we prepared a substitute return for you. You can request information about the substitute return under the Freedom of Information Act (FOIA). We have enclosed an information sheet on how to submit these requests. For more information please visit [www.irs.gov](http://www.irs.gov).

☐ The returns you requested for \_\_\_\_\_ are unavailable. We are providing you with a transcript of the account free of charge for those tax years.

**All inquiries, such as questions about account related activity; you may contact our Customer Service Area.** For questions concerning your individual return, please call 1-800-829-0922. For questions concerning the C, E, and F schedules from personal income tax returns or Form 2106, Employee Business Expenses, please call 1-800-829-8374. For questions concerning business returns, please call 1-800-829-0115.

If you have questions about the information in **this letter ONLY**, please call the RAIVS Team at (512) 460-2255.

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(Rev. November 2005)

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Internal Revenue Service**Request for Transcript of Tax Return**

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OMB No. 1545-1872

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|--|---|
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| <b>2a</b> If a joint return, enter spouse's name shown on tax return               | <b>2b</b> Second social security number if joint tax return   |
- 3** Current name, address (including apt., room, or suite no.), city, state, and ZIP code
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**Sign Here**

Signature (see instructions)

Date

Title (if line 1a above is a corporation, partnership, estate, or trust)

Spouse's signature

Date

Telephone number of taxpayer on line 1a or 2a  
(     )